

Events

ABA Section of Taxation – 2010 Midyear Meeting

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SERVICES

Richard Matta will serve as a speaker at the *American Bar Association (ABA) Section of Taxation 2010 Midyear Meeting* on January 21-23, at the Grand Hyatt in San Antonio, TX. The 2006 tax legislation afforded new distribution options for plan participants and beneficiaries of qualified retirement plans. Such a result makes it desirable to do a rollover to an IRA. There continues to be interest in self-directed IRAs (that is, an IRA owner choosing his/her investment options, beyond that of the IRA trustee's or custodian's investment options). However, there are practical and legal issues that the IRA owner must be aware of before making self-directed investment decisions. Richard will serve on a panel of practitioners and government officials to discuss these practical and legal issues.